

HAND
DELIVERED

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LEGISLATIVE RESOURCE CENTER

2019 MAY 15 PM 3:23

ML (OFFICE USE ONLY)
U.S. HOUSE OF REPRESENTATIVES

A \$200 penalty shall be assessed against any individual who files more than 30 days late.

UNITED STATES HOUSE OF REPRESENTATIVES
2018 FINANCIAL DISCLOSURE STATEMENT

Form A
For Use by Members, Officers, and Employees

Name: WILLIAM H "BILLY" LONG, II Daytime Telephone: _____

FILER STATUS	<input checked="" type="checkbox"/> Member of the U.S. House of Representatives	State: <u>NE</u> District: <u>7</u>	<input type="checkbox"/> Officer or Employee	Employing Office: _____	Staff Filer Type: (if Applicable) Shared <input type="checkbox"/> Principal Assistant <input type="checkbox"/>
REPORT TYPE	<input checked="" type="checkbox"/> 2018 Annual (Due: May 15, 2019)	<input type="checkbox"/> Amendment	<input type="checkbox"/> Termination	Date of Termination: _____	

PRELIMINARY INFORMATION - ANSWER EACH OF THESE QUESTIONS

A. Did you, your spouse, or your dependent child: a. Own any reportable asset that was worth more than \$1,000 at the end of the reporting period? <u>or</u> b. Receive more than \$200 in unearned income from any reportable asset during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	F. Did you have any reportable agreement or arrangement with an outside entity during the reporting period or in the current calendar year up through the date of filing?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
B. Did you, your spouse, or your dependent child purchase, sell, or exchange any securities or reportable real estate in a transaction exceeding \$1,000 during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	G. Did you, your spouse, or your dependent child receive any reportable gift(s) totaling more than \$390 in value from a single source during the reporting period?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
C. Did you or your spouse have "earned" income (e.g., salaries, honoraria, or pension/IRA distributions) of \$200 or more during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	H. Did you, your spouse, or your dependent child receive any reportable travel or reimbursements for travel totaling more than \$390 in value from a single source during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
D. Did you, your spouse, or your dependent child have any reportable liability (more than \$10,000) at any point during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	I. Did any individual or organization make a donation to charity in lieu of paying you for a speech, appearance, or article during the reporting period?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
E. Did you hold any reportable positions during the reporting period or in the current calendar year up through the date of filing?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	ATTACH THE CORRESPONDING SCHEDULE IF YOU ANSWER "YES"	

IPO AND EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION - ANSWER EACH OF THESE QUESTIONS

IPO - Did you purchase any shares that were allocated as a part of an Initial Public Offering during the reporting period? If you answered "yes" to this question, please contact the Committee on Ethics for further guidance.

Yes ☐ No ☒

TRUSTS - Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust that benefits you, your spouse, or dependent child?

Yes ☐ No ☒

EXEMPTION - Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or your dependent child because they meet all three tests for exemption? Do not answer "yes" unless you have first consulted with the Committee on Ethics.

Yes ☐ No ☒

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Use additional sheets if more space is required.

William H. Long, II
 United States House of Representatives
 Financial Disclosure Statement - Form A
 Calendar Year 2018

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Schedule A - Assets and "Unearned Income"

Schedule A - Assets and/or Income Source													Value of Asset													Type of Income													Amount of Income													Transaction
Asset and/or Income Source													A	B	C	D	E	F	G	H	I	J	K	L														I	II	III	IV	V	VI	VII	VIII	IX	X	XI				
None																																																				
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Bank Accounts:

JT Bancorpsouth, checking account																										
JT Springfield First Community Bank																										
JT Congressional Federal Credit Union, Checking																										
JT Congressional Federal Credit Union, Savings																										
SP Springfield First Community Bank, Hith Svgs Acct																										

Mortgage Note Receivable:

JT Kathy and Shawn Whitman, Fair Grove, MO																										
--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Oil Interest

JT Resource Strategies LLC																										
JT HRH Resources																										
JT Finley Resources, Inc																										

Stock and Securities:

JT Fidelity Investments: 133-207446																										
Fidelity Government Money Market																										
Fidelity Municipal Money Market																										
Chesapeake Energy Corp																										
Direxion ETF																										
PepperRock Res Corp																										
Southern Co																										
JT Stocks Held, TD Ameritrade 424-967538																										
Money Balance																										

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Asset and/or Income SourcePage 2 of 4

William H. Long, II
United States House of Representatives
Financial Disclosure Statement - Form A
Calendar Year 2018

Schedule A - Assets and "Unearned Income"

Asset and/or Income Source	Value of Asset												Type of Income											Amount of Income											Transaction											
	A	B	C	D	E	F	G	H	I	J	K	L	None DIVIDENDS RENT INTEREST CAPITAL GAINS EXCEPTED/BLIND TRUST TAX DEFERRED											OTHER TYPES OF INCOME											I	II	III	IV	V	VI	VII	VIII	IX	X	XI	
Linco, LLC Com													None																																	
Millenniu. Plastics Corp													\$ 1 - \$ 1,000																																	
Nexpath Technologies Inc													\$ 1,001 - \$ 15,000																																	
SCAC Hldgs Corp New													\$ 15,001 - \$ 50,000																																	
Southern Company													\$ 50,001 - \$ 100,000																																	
Fidelity Investments: (IRA) 2AX-343196													\$ 100,001 - \$ 250,000																																	
Fidelity Magellan Fund													\$ 250,001 - \$ 500,000																																	
Vanguard Voyager Services 58166768													\$ 500,001 - \$ 1,000,000																																	
Prime Money Mkt Fund													\$ 1,000,001 - \$ 2,500,000																																	
Apple Inc													\$ 2,500,001 - \$ 5,000,000																																	
Wells Fargo Advisors: (4143-5730)													\$ 5,000,001 - \$ 1,000,000,000																																	
Bank Deposit Sweep													\$ 1,000,000,001 - \$ 5,000,000,000																																	
Centurylink Inc													\$ 5,000,000,001 - \$ 25,000,000,000																																	
Kinder Morgan Mgmt LLC													\$ 25,000,000,001 - \$ 50,000,000,000																																	
Legg Mason, Clearbridge Tactical													\$ 50,000,000,001 - \$ 1,000,000,000,000																																	
Omega Healthcare REIT Invest Inc													\$ 1,000,000,000,001 - \$ 5,000,000,000,000																																	
The Southern Company													\$ 5,000,000,000,001 - \$ 25,000,000,000,000																																	
Thornburg Inv't Tr Income Bldr Fd													\$ 25,000,000,000,001 - \$ 50,000,000,000,000																																	
Fidelity Investments: 414-229393													\$ Over \$ 50,000,000,000																																	
Southern Co													None																																	
Fidelity Magellan Stk Fnd													DIVIDENDS																																	
Fidelity Cash Reserves													RENT																																	
													INTEREST																																	
													CAPITAL GAINS																																	
													EXCEPTED/BLIND TRUST																																	
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William H. Long, II
 United States House of Representatives
 Financial Disclosure Statement - Form A
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Schedule A - Assets and "Unearned Income"

Asset and/or Income Source	Value of Asset													Type of Income	Amount of Income											Transaction
	A	B	C	D	E	F	G	H	I	J	K	L			I	II	III	IV	V	VI	VII	VIII	IX	X	XI	
None													None													
\$ 1 - \$ 1,000													\$ 1 - \$ 200													
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Over \$ 50,000,000																										
None													None													
DIVIDENDS													DIVIDENDS													
RENT													RENT													
INTEREST													INTEREST													
CAPITAL GAINS													CAPITAL GAINS													
EXCEPTED/BLIND TRUST													EXCEPTED/BLIND TRUST													
TAX DEFERRED													TAX DEFERRED													
OTHER TYPES OF INCOME													OTHER TYPES OF INCOME													
None													None													
\$ 1 - \$ 200													\$ 1 - \$ 200													
\$ 201 - \$ 10,000													\$ 201 - \$ 10,000													
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Over \$ 50,000,000													Over \$ 50,000,000													

Business Interests:

Billy Long, Inc., Sub S Corporation Real Estate Commission Sales 3923 E. Glen Abbey Dr., Springfield, MO																										
SP 80% shareholder interest Professional Realty Referral, Inc., S Corporation Real Estate Commission Sales 3923 E. Glen Abbey Dr., Springfield, MO																										
SP 100% shareholder interest BCL Homes, Sole Proprietor 3923 E. Glen Abbey Dr., Springfield, MO																										
SP 100% interest																										

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Use additional sheets if more space is required.

SCHEDULE B --- TRANSACTIONS

		Type of Transaction		Date	Amount of Transaction																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																				
SP, DC, JT	ASSET	PURCHASE	SALE	Check Box if Capital Gain Exceeded \$200																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																					
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Name: WILLIAM H. BILLY "LONG, II"

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EXCLUDE: Military pay (such as National Guard or Reserve pay), federal retirement programs, and benefits received under the Social Security Act.

INCOME LIMITS and PROHIBITED INCOME: The 2018 limit on outside earned income for Members and employees compensated at or above the "senior staff" rate was \$28,050. The 2019 limit is \$28,440. In addition, certain types of income (notably honoraria, director's fees, and payments for professional services involving a fiduciary relationship) are totally prohibited.

[illegible]

William H. Long, II
United States House of Representatives
Financial Disclosure Statement - Form A
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Schedule C - Earned Income		
Source	Type	Amount
Keller Williams Realty, Inc.	Residual Commissions for Services Rendered Prior to House Employment	28,608
Keller Williams Realty, Inc.	Spouse Residual Commissions	N/A

SCHEDULE D - LIABILITIES

Name: William H. "Buddy" Lowe, II

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Report liabilities of over \$10,000 owed to any one creditor at any time during the reporting period by you, your spouse, or your dependent child. Mark the highest amount owed during the reporting period. **Members:** Members are required to report all liabilities secured by real property including mortgages on their personal residence. **Exclude:** Any mortgage on your personal residence (unless you rent it out or are a Member); loans secured by automobiles, household furniture, or appliances; liabilities of a business in which you own an interest (unless you are personally liable); and liabilities owed to you by a spouse or the child, parent, or sibling of you or your spouse. Report a revolving charge account (i.e., credit card) only if the balance at the close of the reporting period exceeded \$10,000. *Column K is for liabilities held solely by your spouse or dependent child.

SP, DC, JT	Creditor	Date Liability Incurred MO/YR	Type of Liability	Amount of Liability										
				A \$10,001-\$15,000	B \$15,001-\$50,000	C \$50,001-\$100,000	D \$100,001-\$250,000	E \$250,001-\$500,000	F \$500,001-\$1,000,000	G \$1,000,001-\$5,000,000	H \$5,000,001-\$25,000,000	I \$25,000,001-\$50,000,000	J Over \$50,000,000	K Over \$1,000,000* (Spouse/DC Liability)
Example	First Bank of Wilmington, DE	5/16	Mortgage on Rental Property, Dover, DE				X							
	1 PAGE ATTACHED													

SCHEDULE E - POSITIONS

Report all positions, compensated or uncompensated, held during the current or prior calendar year as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or other business enterprise, nonprofit organization, labor organization, or educational or other institution other than the United States. **Exclude:** Positions held in any religious, social, fraternal, or political entities (such as political parties and campaign organizations); and positions solely of an honorary nature.

Position	Name of Organization
NONE	NONE

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 United States House of Representatives
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Schedule D - Liabilities

SP, DC, JT	Creditor	Date Liability Incurred Mo/Year	Type of Liability	Amount of Liability										
				A	B	C	D	E	F	G	H	I	J	
				\$ 10,000	1	\$ 15,000	0	0	0					
				\$ 15,000	1	-	\$ 50,000	0	0	0				
				\$ 50,000	1	-	\$ 100,000	0	0	0				
				\$ 100,000	1	-	\$ 250,000	0	0	0				
				\$ 250,000	1	-	\$ 500,000	0	0	0				
				\$ 500,000	1	-	\$ 1,000,000	0	0	0				
				\$ 1,000,000	1	-	\$ 5,000,000	0	0	0				
				\$ 5,000,000	1	-	\$ 25,000,000	0	0	0				
				\$ 25,000,000	1	-	\$ 50,000,000	0	0	0				
				\$ Over		\$ 50,000,000	0	0	0	0				

SP SFC Bank, Springfield, MO

9/9/2016

Line of Credit Business Loan
 BCL Homes

x

SCHEDULE F – AGREEMENTS

Name: WILLIAM H. "BILLY" LONG, II

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Identify the date, parties to, and general terms of any agreement or arrangement that you have with respect to: future employment; a leave of absence during the period of government service; continuation or deferral of payments by a former or current employer other than the U.S. government; or continuing participation in an employee welfare or benefit plan maintained by a former employer.

Date	Parties to Agreement	Terms of Agreement
	None	

SCHEDULE G – GIFTS

Report the source (by name), a brief description, and the value of all gifts totaling more than \$390 received by you, your spouse, or your dependent child from any source during the year. **Exclude:** Gifts from relatives, gifts of personal hospitality from an individual (which may not include a registered lobbyist or foreign agent), local meals, and gifts to a spouse or dependent child that are totally independent of his or her relationship to you. Gifts with a value of \$156 or less need not be added towards the \$390 disclosure threshold. **Note:** The gift rule (House Rule 25, clause 5) prohibits acceptance of gifts except as specifically provided in the rule and some gifts require prior approval of the Committee on Ethics.

Source	Description	Value
Example: Mr. Joseph Smith, Arlington, VA	Silver Platter (prior determination of personal friendship received from the Committee on Ethics)	\$400
None		

Name: William K "Billy" Long Page 14 of 15

Identify the source and list travel itinerary, dates, and nature of expenses provided for travel and travel-related expenses totaling more than \$300 received by you, your spouse, or your dependent child during the reporting period. Indicate whether a family member accompanied the traveler at the sponsor's expense. Disclosure is required regardless of whether the expenses were paid directly by the sponsor or were paid by you and reimbursed by the sponsor.

EXCLUDE: Travel-related expenses provided by federal, state, and local governments, or by a foreign government required to be separately reported under the Foreign Gifts and Decorations Act (FGDA, 5 U.S.C. § 7342); political travel that is required to be reported under the Federal Election Campaign Act; travel provided to a spouse or dependent child that is totally independent of his or her relationship to the filer.

[illegible]

Name: William H. "Bully" Love

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